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Our Mission:
*“Keep More Money
in Your Pocket!”*

Income Tax Filing Guide

Important Tax Documents

(Gather these documents in order to file your taxes.)

- | | |
|--|---|
| (W-2) Income from Employers | (1099-R) Pension/IRA/401(k) Distributions |
| (W-2G) Gambling Winnings | (1099-S) Real Estate Sales |
| (1098) Mortgage Interest Statement | (K-1) Shareholder's Share of Income from Partnerships, LLCs or S-Corporations |
| (1098-E) Student Loan Interest | Childcare Fee Statements |
| (1098-T) Tuition Statements | Donation Receipts & Statements |
| (1099-A) Acquisition/abandonment of secured property | IRA Deposits & Withdrawals |
| (1099-B) Stocks, Bonds, Bartering | Rental Property Income |
| (1099-C) Canceled Debt | Contributions to Education Programs (529) |
| (1099-DIV) Dividend Statement | Settlement Statements (Purchase or Sale of Property) |
| (1099-G) Unemployment Compensation/State Tax Refunds | Social Security Benefits Statement |
| (1099-INT) Interest Statements | Amounts Received from SBA Loans |
| (1099-LTC) Long Term Care Benefits | |
| (1099-Misc) Miscellaneous Income | |
| (1099-MSA) Medical Savings Accounts | |

Any statement you received that says
“Important Tax Document”

Medical Expenses*

**Total must be MORE THAN 7.5% of your income*

- | | | |
|---|---|---|
| <ul style="list-style-type: none">• Abortion (Legal)• Bandages• Birth control pills prescribed by your doctor• Body scan• Braille books• Breast pump and supplies• Capital expenses for equipment or improvements to your home needed for medical care• Co-Payments• Diagnostic devices• Expenses of an organ donor• Eye surgery (to promote the correct function of the eye)• Fertility enhancement• Guide dogs or other animals aiding the blind, deaf and disabled | <ul style="list-style-type: none">• Hospital services fees (lab work, therapy, nursing services, surgery, etc.)• Lead-based paint removal• Legal operation to prevent having children such as a vasectomy or tubal ligation• Long-term care contracts• Qualified Meals & lodging provided by a hospital during medical treatment• Medical services fees (from doctors, dentists, surgeons, specialists & other practitioners)• Medicare Part D premiums• Medical and hospital insurance premiums• Nursing services• Oxygen equipment and oxygen• Part of life-care fee paid to retirement home• Physical examination | <ul style="list-style-type: none">• Pregnancy test kit• Prescription medicines• Psychiatric and psychological treatment• Social security tax, Medicare tax, FUTA, and state employment tax for worker providing medical care• Special items (artificial limbs, false teeth, eyeglasses, contact lenses, hearing aids, crutches, wheelchair, etc.)• Special education for mentally or physically disabled persons• Stop-smoking programs• Transportation for needed medical care• Treatment at a drug or alcohol center• Wages for nursing services |
|---|---|---|

Donations

Cash/Check (ex: Church, Feed the Hungry, etc)
 Payroll Deduction (ex: United Way, Red Cross)
 Charitable Mileage
 Other Charitable Costs
 Appraisal fees to determine value of Donations

Non-Cash Items (ex: Clothing, Furniture, Food)
 Date of Donation
 Non-Profit Organization Name
 Address
 Items & Value

Other Deductions

State Tax Payments
 Estimated Taxes paid
 Real Estate Taxes

Car/Boat/Motorcycle Tags
 Mortgage Interest & Points
 Income Tax Preparation
 Child Care Fees Paid

Legal Fees/Advice
 Safe Deposit Box

Moving Expenses*

****Active Duty Military ONLY—who are Making a PERMANENT MOVE***

Date of Move
 Old Home City
 New Home City
 Truck Rental
 Amount Employer Reimbursed
 Mileage: old home to new job

Mileage: old home to old job
 Packing Materials
 Hotels
 Moving Company Fees
 Storage

Rental Property

(Each property must be listed separately)

Date Purchased
 Purchase Price
 Property Address
 Date Sold
 Selling Price
 Date Rented
 Rent Received
 Advertising
 Appliances
 Item
 Date of Purchase
 Cost
 Appraisals
 Assessment Fees
 Blinds/Curtain
 Bookkeeping
 Carpet
 Cleaning Service
 Cleaning Supplies
 Closing Costs
 Commissions
 Contractor Fees
 Decorating Costs
 Deposits

Electrician
 Fence
 Filing Fees
 Fire Extinguishers
 Floors
 Furniture
 Item
 Date of Purchase
 Cost
 Homeowners Association Fees
 Installation Fees
 Insurance
 Investment Counseling Costs
 Lawn Maintenance
 Leasehold Improvements
 Lease Preparation
 Legal Fees
 Maintenance
 Major Improvements
 Management Fees
 Mileage
 Misc. Items (Light Bulbs, Door
 Knobs, Faucets, etc)
 Mortgage Interest

Moving Expenses for
 Equipment/Appliances
 Office Supplies/Books
 Office Rent
 Painting
 Pest Control
 Plants/Flowers
 Plumbing
 Refinance Charges
 Rent Collection Costs
 Repairs
 Roof
 Sanitation
 Salaries
 Security System
 Smoke Alarms
 Stationery & Supplies
 Supplies
 Taxes
 Tax Counseling
 Tax Return Preparation
 Traveling Expenses
 Utilities
 Walls

Self Employment/ Business Deductions

Income	Faxing Charges	Security System/Alarms
Accountant	Freight	Software
Advertising	Furniture Purchased	Storage
Business Cards	Item	Supplies
Flyers/Posters	Date Purchased	Taxes
Stationery	Cost	Federal
TV/Radio	% of Business Use	State
Telephone Directory	Furniture Rental/Lease	Employer
Newspaper/Magazine	Gifts to Customers	Payroll
Billboards	Gifts to Employees	Business Property
Internet	Gifts to Other Businesses	Sales
Specialty Items (Pens, Cups, Magnets, etc)	Graphic Design	Tax Counseling
Answering Service	Insurance	Tax Preparation
Auto Expenses:	Liability	Telephone
Business Mileage _____	Disability	Office
OR	Errors & Omissions	Cellular
Actual Expenses	Health	Travel
Monthly Payment	Life	Air Fare
Total Cost of Vehicle	Malpractice	Cab Fare
Make, Model & Year	Workers Compensation	Hotel
Date Business Use Began	Information Services	Tools
Parking/Tolls	Internet Service/DSL	Utilities
Gas/Oil	Interest on Business Loans	Electricity
Car Washes/Waxes	Inventory	Gas
Insurance	Janitorial Service	Sanitation
Garage Rent	Licenses/Permits	Water
Tires/Accessories	Legal Fees	Cable (Commercial Office Only)
Repairs	Magazine/Newsletter	Uniforms
Inspection/Registration	Subscriptions	Purchase
Taxes	Mailing Lists	Cleaning/Maintenance
Banking Fees	Marketing Promotions	Website/Web Hosting
Billing Service	Market Research	Wages
Bookkeeping	Meals on Work Premises	
Bonds (Surety, Fidelity, etc)	Mortgage Interest (Purchase of Business Building)	Home Office
Catering	Music System (in Office)	<i>(Use Monthly Figures)</i>
Check Validation Service	Music (CDs/Tapes)	<i>Square Footage of Home</i>
Commissions	Office Supplies (Ex: Paper, Pens, Ink, etc.)	<i>Square Footage of Office</i>
Consultant Fees	Payroll Service	Monthly Rent
Contractors	Pension Plans	Annual Mortgage Interest
Courier Service	Profit Sharing	Electricity
Credit Card Terminal Rental	Employee Benefit Programs	Gas
Credit Card Service Fees	SEP	Water
Delivery Charges	401(k)	Sanitation
Decorating Expenses	Cafeteria Plan	Internet
Donations	Postage	Pest Control
Drinking Water	Post Office Box	HOA
Books	Professional Services	Repairs to Home
Classes/Seminars	Prof. Association Dues	Repairs to Office Space
Workshops/Conferences	Pager	Home Owners Insurance
Equipment Purchases	Printing	Security Alarm Service
Item	Prizes	Decorating/Painting Art/Plants
Date Purchased	Referral Fees	Total Cost of Home
Cost	Rent (Office Space)	Date Business Use Began
Equipment Rental/Lease	Sanitation	
Filing Fees		